Presentation of recent research:
ITU Africa Telecom Indicators 2004

Dr Tim Kelly, Head, Strategy and Policy Unit
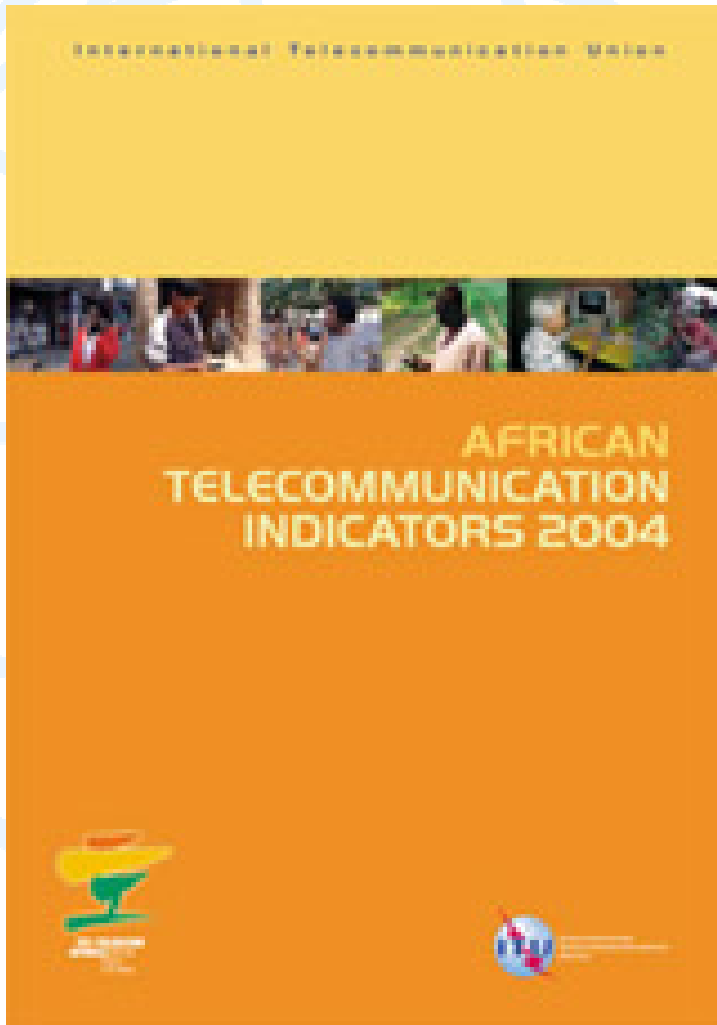
International Telecommunication Union (ITU)

World Dialogue on Regulation, Cairo, 3 May 2004

New report, released 3 May 2004

AFRICAN TELECOMMUNICATION INDICATORS 2004

1. **Mobile Africa**
2. **Mobile Business**
3. **Wireless Internet**
4. **Mobile Policy**
5. **Mobile future**
- **African Telecom Indicators (statistics to year-end 2002/03)**
- **Country Pages**
- **Directory of Telecom Organisations**

136 pages

Africa now has <u>twice</u> as many mobile users as fixed lines

Telephone users per 100 inhabitants, 1995-2003
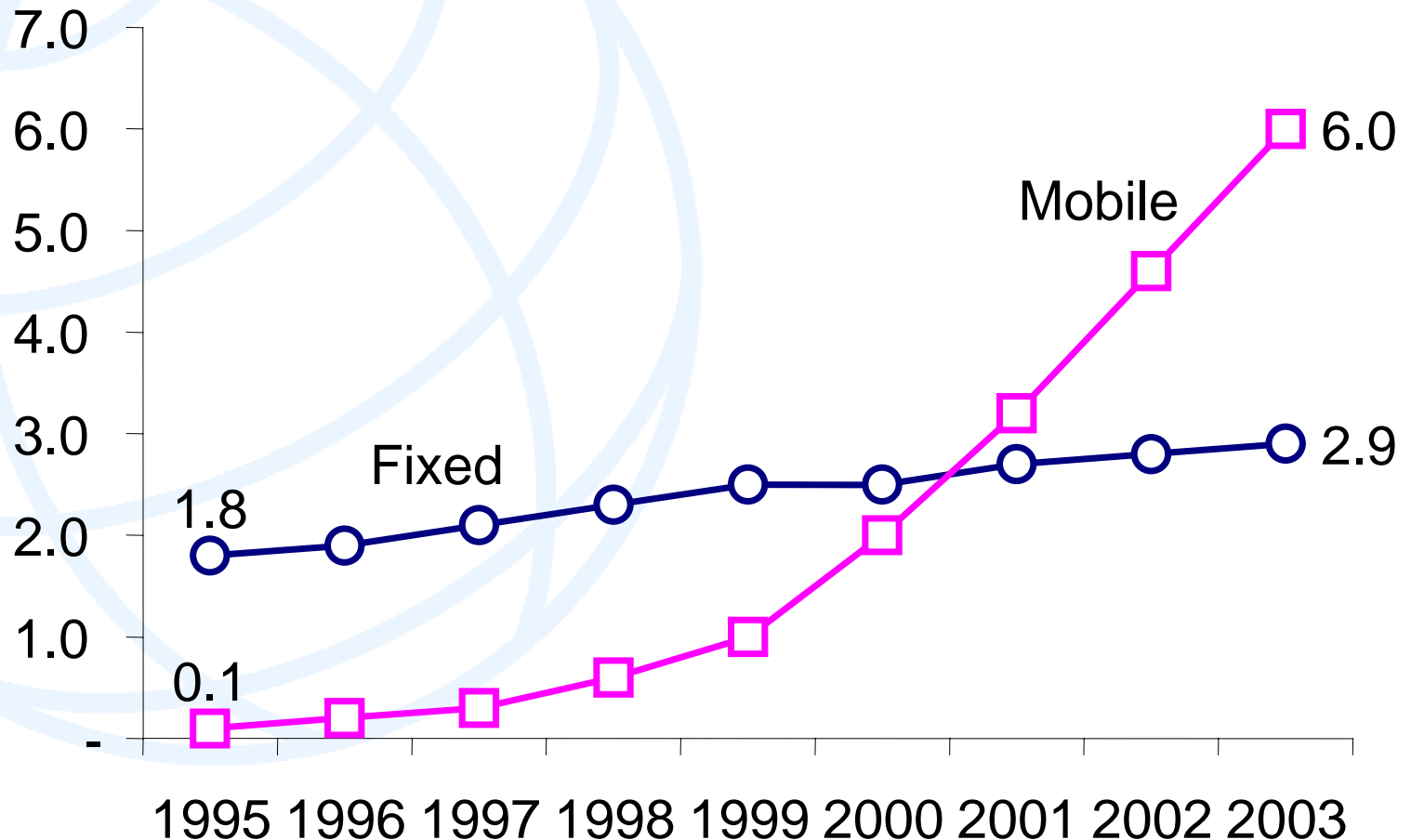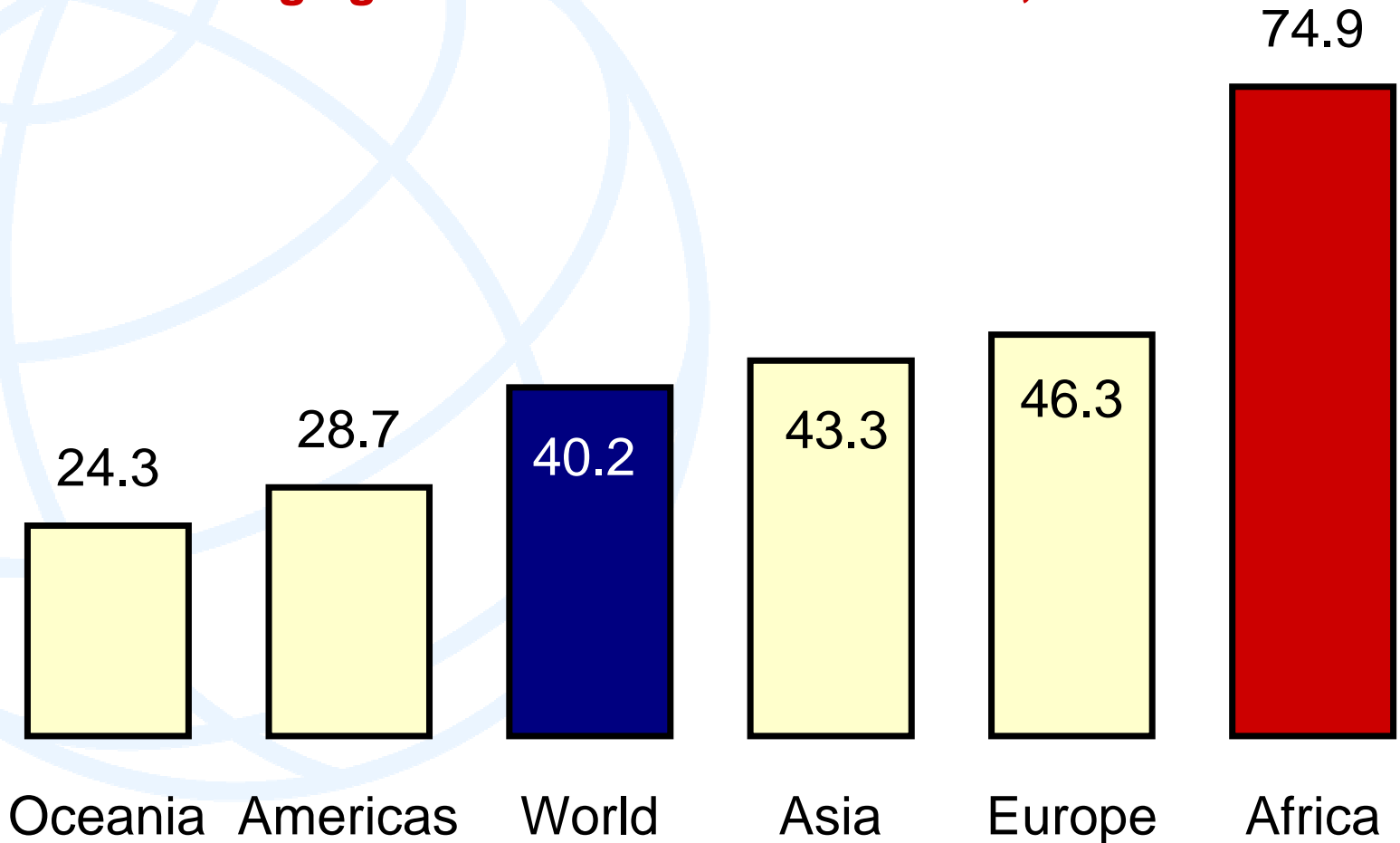

Source: ITU African Telecommunication Indicators, 2004

Africa has the world's fastest growing mobile network

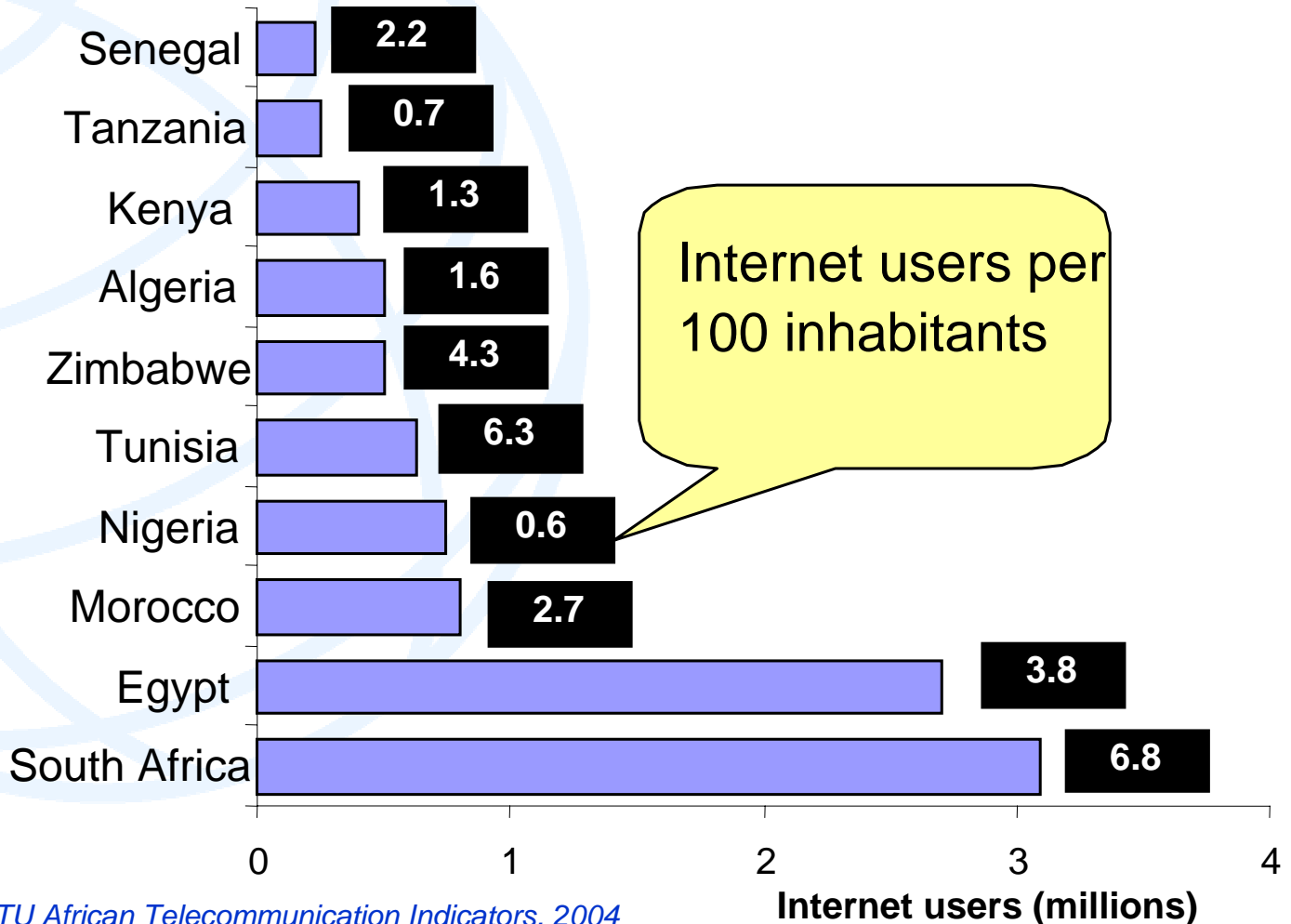**Annual average growth in mobile subscribers, 1997-2002**

Chart — Annual average growth in mobile subscribers, 1997-2002:

- Oceania: 24.3
- Americas: 28.7
- World: 40.2
- Asia: 43.3
- Europe: 46.3
- Africa: 74.9

Source: ITU African Telecommunication Indicators, 2004

Emerging regional powerhouses
Africa's Top 10 Mobile Operators

	Operator	Mobile subscribers (000s) 2003	Δ % 2002-03
1	Vodacom (South Africa)	8'910	13%
2	MTN (South Africa)	6'050	28%
3	Maroc Telecom	5'214	13%
4	MobiNil (Egypt)	2'991	31%
5	Vodafone Egypt	2'740	29%
6	Méditel (Morocco)	2'060	29%
7	MTN Nigeria	1'650	82%
8	Safaricom (Kenya)	1'376	112%
9	Cell C (South Africa)	1'300	94%
10	Djezzy (Algeria)	1'268	302%
	Top 10	**33'559**	**30%**

International Telecommunication Union

Africa now has more than 12 million Internet Users

Top 10 African economies by number of Internet Users, 2003

Internet users per 100 inhabitants

Country	Internet users (millions)	Internet users per 100 inhabitants
Senegal		2.2
Tanzania		0.7
Kenya		1.3
Algeria		1.6
Zimbabwe		4.3
Tunisia		6.3
Nigeria		0.6
Morocco		2.7
Egypt		3.8
South Africa		6.8

Internet users (millions)

Source: ITU African Telecommunication Indicators, 2004

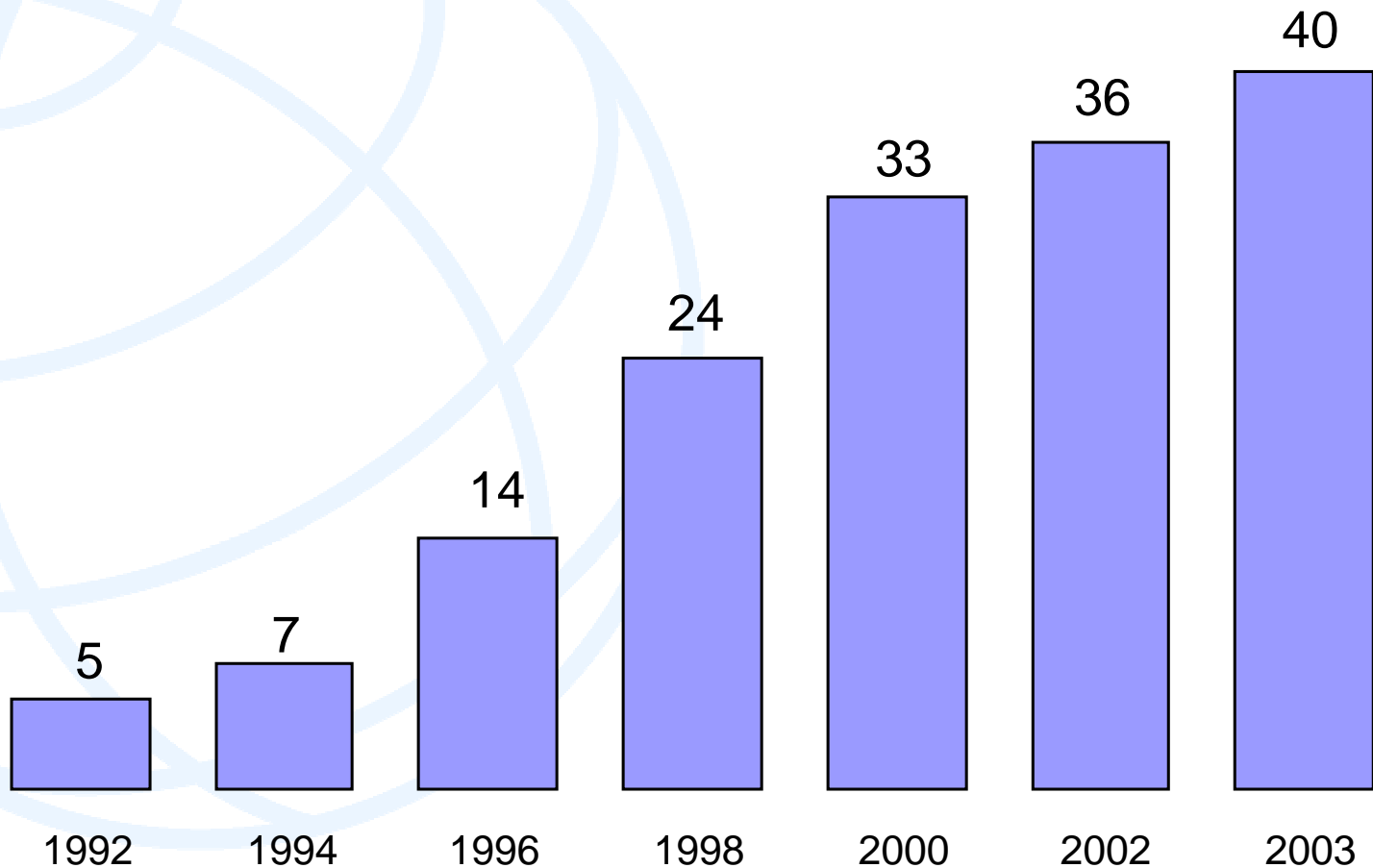# Africa's markets are increasingly competitive

Africa's mobile market structure, by number of countries
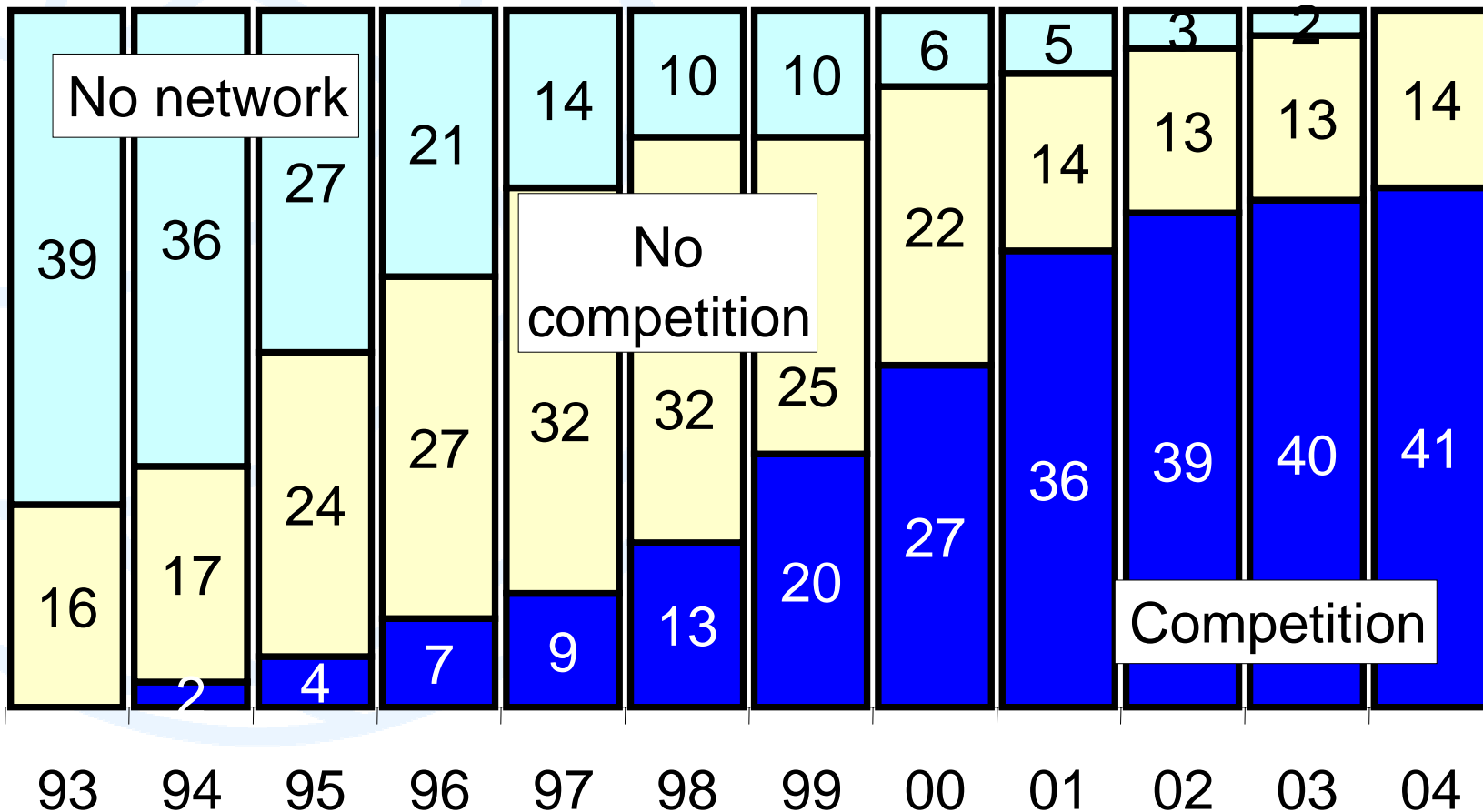
Source: ITU African Telecommunication Indicators, 2004

The rise of independent regulators
Cumulative number of telecom regulatory agencies, by year of creation

Source: ITU World Telecommunication Regulatory Database.

Research themes for 2004/05

● Follow-up to the WSIS

➢ Internet Governance, including management of Internet resources, SPAM, security issues, traffic flow etc

➢ Digital divide, including creating a digital divide index, technologies for bridging the digital divide, funding mechanisms etc

➢ Research and statistics-based reports

➢ The Portable Internet, or technologies that fit between WLAN and 3G (e.g. WiMAX, Ultrawideband, portable Internet etc)

➢ Trends in Telecom reform: Licensing in an era of convergence

➢ Regional Indicator reports (Africa, Asia, Americas)

A brighter outlook for Africa

- **ICT market has doubled in size since 2000**
  - ➢ **More users added in the first few years of the new century than in the previous 100 years**
- **World's fastest growing mobile economy**
  - ➢ **Passing 50 million mobile users in 2003**
- **World's fastest growing regional Internet**
  - ➢ **Passing 12 million Internet users in 2003**
- **Competitive markets**
  - ➢ **75% of African economies have more than one mobile operator**
- **Effective, independent regulators**
  - ➢ **Half of them established within last five years**

While you are here:
Forum @ TELECOM Africa 2004

	ADVANTAGE AFRICA					
Mon. 03 May		**OPENING Ceremony** 1145H – 1230H Room: Cheops		**YF.1 - OPENING** 1400H - 1500H	**YF.2** - 1530H - 1830H Technology and Applications	
Tue. 04 May	**OPENING 1** - 1000H - 1100H Advantage Africa	**OPENING 2** - 1130H - 1300H The State of the Industry		**PLENARY 1** - 1430H - 1600H Policy Visions	**PLENARY 2** - 1630H - 1800H New Challenges, New Institutions	
				WORKSHOP 1 - 1430H - 1700H Voice over IP		
		YF Lunch Session - 1230H - 1430H Vodafone		**YF.3** - 1430H - 1730H Telecom Policies & Regulations		
Wed. 05 May	**PLENARY 3** - 0900H - 1030H Mobile Africa	**PLENARY 4** - 1100H - 1230H Building the Infrastructure		**PLENARY 5** - 1430H - 1600H Creating Successful Business Models	**PLENARY 6** - 1630H - 1800H Investment and Finance	
				WORKSHOP 2 - 1430H - 1700H Management of Internet Resources		
	YF.4 - 0930H - 1230H Finance & Business Opportunities		**YF Lunch Session** - 1230H - 1430H Intelsat	**YF.4a** - 1430H - 1730H Working Session - Development of a Youth Action Plan for Africa		
Thurs. 06 May	**PLENARY 7** - 0900H - 1030H ICT for Development: Case Studies	**PLENARY 8** - 1100H - 1230H Using ICTs to achieve NEPAD objectives		**PLENARY 9** - 1430H - 1600H Promoting Universal Access and Use	**CLOSING** - 1630H - 1800H Digital Solidarity (WSIS)	
	SPECIAL WORKSHOP - 0930H - 1100H National and Pan African IXP			**WORKSHOP 3** - 1400H - 1630H Fostering Local Content and Software Development		
	YF.5 - 0900H - 1130H Development of a Youth Action Plan for Africa (Working Group - report back from drafting team)		**YF Free time**			**YF - CLOSING** 1800H - 1900